

Gifts of Stock – Transfer Instructions

Thank you for your generous gift to support the First United Methodist Church of Coppell. Please follow the steps below to ensure your gift is credited appropriately.

STEP 1: Please give the following information to your broker.

Broker Information:

Company Name: National Financial Services
DTC#: 0226
Account Name: Texas Methodist Foundation
Account Number: X83-950873

STEP 2: Please complete the following form and e-mail it to **both** Randi Forrest at TMF (rforrest@tmf-fdn.org) and to Challis Castleberry, Director of Finance at FUMC Coppell (ccastleberry@fumccoppell.org). Forms will not be accepted via fax.

Donor Details

Today's Date	
Full Name	
Address	
Phone	
Email	

Stock Details

Stock name/Ticker	
# of shares	

Beneficiary Details

Church name/City	Coppell First (aka First United Methodist Church of Coppell)
TMF account #	7467
Fund to apply the sale proceeds (general budget, building campaign, missions, etc)	

Notes:

- Stock will be sold once received into the TMF account, pending receipt of the instructions contained in this form.
- FUMC Coppell will issue the donor acknowledgement receipt.
- Questions? Contact Randi Forrest at 800-933-5502 or rforrest@tmf-fdn.org or Challis Castleberry at 972-462-0471 or ccastleberry@fumccoppell.org.